



Quick Start

# End User Companion Guide

Keys to Getting Started with ClockIN – At Your Pace

By ClockIN Users Success

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## Welcome and Overview

**Thank you** for choosing ClockIN. We greatly appreciate your business and the opportunity to support your success. The ClockIN End User Companion Guide corresponds with the Quick Start checklists for getting started with ClockIN. Below are some tips to help you get started with the checklist items found on the Home page of your ClockIN tenant.

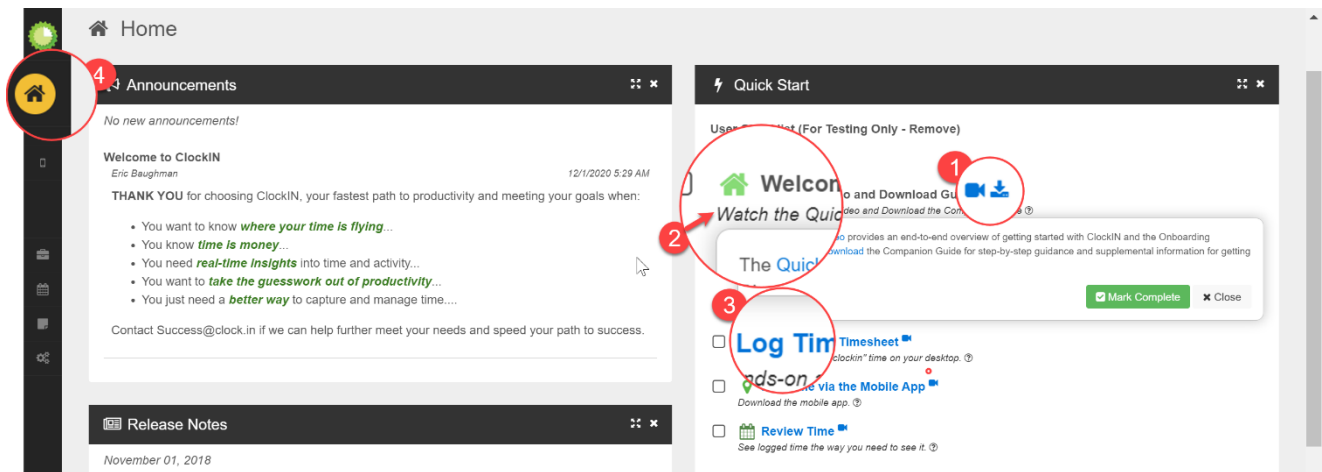


Figure 1 - Quick Tips for the Quick Start

- 1 **Watch Video or Download PDF** when clicking on an icon.
  - 2 **Learn More** via the information drop-down when clicking on the subtext link or ? icon.
  - 3 **Go Hands-On** clicking the topic link and using the step-by-step checklist instructions below.
  - 4 **Return Home** after hands-on by clicking the Home icon and continuing with the checklist.
- **Help** – We are here to help and would love to hear from you in a variety of ways:

💬 **Support/Chat** in the ClockIN tenant to submit a request or start a conversation.

☎ **Call** us toll free at 1-833-3CLOCKN (1-833-325-6256)

✉ **Email** us at [Support@Clock.in](mailto:Support@Clock.in)

A separate User Onboarding Guide and checklist is provided to Managers and Administrators upon setup in ClockIN. This guide is recommended for End Users to learn the features they need to know. Contact us if you'd like an instructor facilitated session to help get you and your team jumpstarted.

We look forward to helping achieve your business goals and supporting your continued success.

*ClockIN Success Team*

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## Quick Start

### □ About ClockIN – an Introduction

ClockIN is your fastest path to productivity and meeting your goals when:

- You want to know *where your time is flying...*
- You know *time is money...*
- You need *real-time insights* into time and activity...
- You want to *take the guesswork out of productivity...*
- You just need a *better way* to capture and manage time...
- And more...

Customers find it useful to watch the short videos first and then use the step-by-step instructions if needed. Whatever works best for you. The [Welcome Video](#) helps set the stage!

Once you have a basic orientation to the system, and its accessibility from the desktop, browser, or mobile app, then work through the Setup and Manage checklist items as need and time permits. Most of the items should take only a few minutes, but work at your own pace and upon completion of the checklists you will have a solid foundation related to what ClockIN can do, and the many benefits it can provide to your organization. Additional training and learning options are available by contacting [Success@clock.in](mailto:Success@clock.in).

## □ Make it yours – Personalize your ClockIN settings

Make it yours with a profile picture and additional notification options. [Watch the video.](#)

1. Go to your **Username** on the top-right of the Home Page.
2. Click the dropdown and select "**User Settings**."
3. **Follow the instructions** in the User Setting Dialogue box.

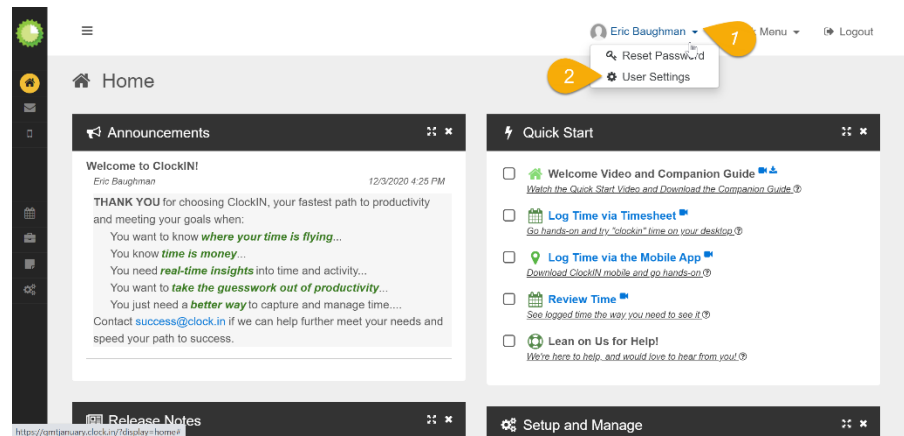


Figure 2 – Access User Settings

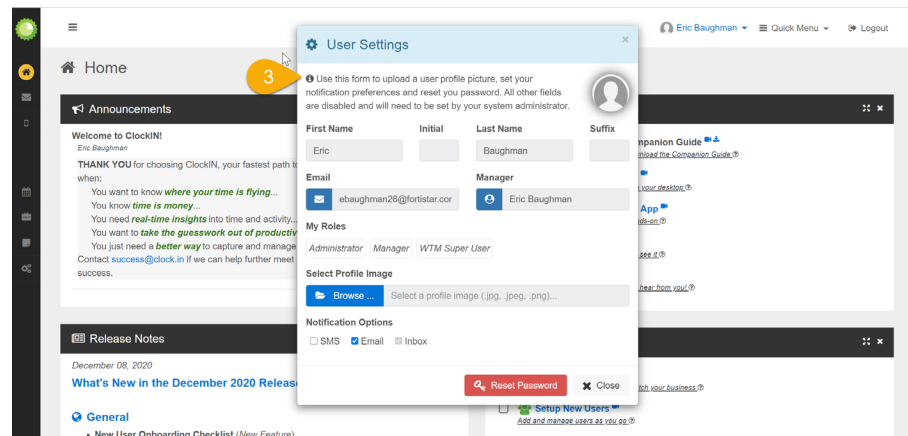


Figure 3 - Configure User Settings

## □ Clock in Anywhere – Start tracking your time while you learn

Users can use easily track time using the “clock in” feature via the desktop (ClockIN tenant), mobile device, or both. By clocking in, users start the time clock for a related activity and can clock out from their desktop or mobile. Start by clocking in to track your time for learning the Time Clock feature using the steps and annotated screen captures below. [Watch the video.](#)

1. Use the in app "Help" to guide you step-by-step through the Time Clock:
  - a. Go to the left-side menu and expand **Time**.
  - b. Click the **Time Clock** option.
  - c. Click **Help** in the upper-right of the screen to enable the inline help that will guide you step-by-step.
  - d. **Follow the instructions**, using the **suggestions below (e-i)** to Clock In.

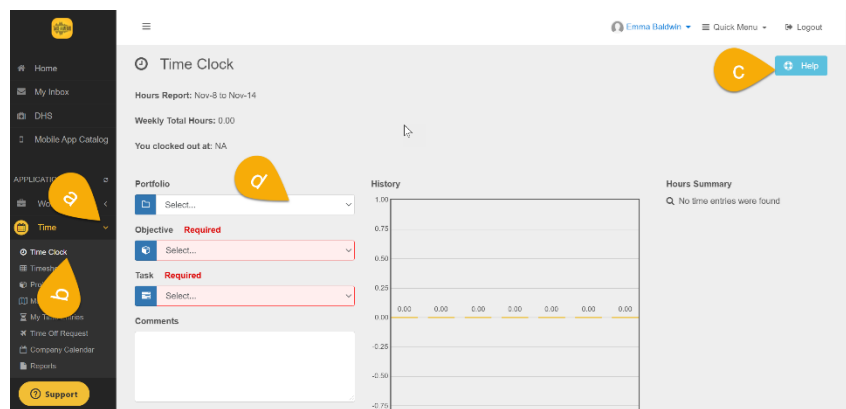


Figure 4 - Time Clock Inline Help

- e. **Portfolio** - select **General** from the drop down.  
**NOTE:** The Portfolio represents the group of time tracking items (Projects/Objectives) to log time against. By default, ClockIN provides a General group, however your organization may add others in the future.
- f. **Objective** - select **Customer Onboarding**.  
**NOTE:** Objectives are the Projects or Groupings of items to log your time against. Objectives help organize time tracking tasks/activities.
- g. **Task** - select **New Customer Onboarding**.  
**NOTE:** which is the specific activity for your time.
- h. **Comments** (Optional): **Type a comment** to provide supporting detail time logged.  
**NOTE:** Comments allow for users to capture and share information, providing a short narrative for greater management insight when viewing time reports.
- i. **Click "Clock In"** to start to clock, recording the time spent on the selected activity.

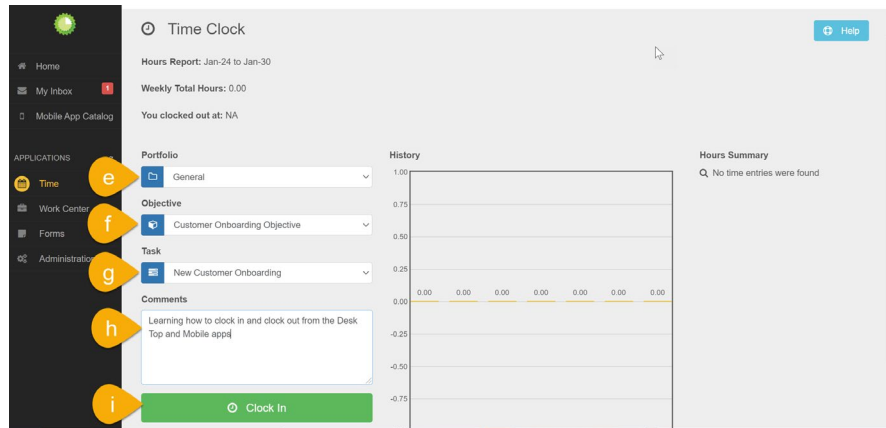


Figure 5 - Clock In via Time Clock

**Next** you will download the ClockIN mobile app and then clock out you time from your mobile.

## □ Get the Mobile App – Download the iOS or Android App

[View the video](#) for a quick overview of the ClockIN mobile app and how to download the app.

This solution requires a mobile application be installed and linked to your account. Updated mobile versions of ClockIN for Android and iPhone are available in the Google Play Store and Apple App Store respectively. Users receive a download link for the mobile app via email and/or text after initial set-up by their ClockIN administrator. Alternatively, open a browser via your mobile device and go to [apps.clock.in](https://apps.clock.in).



*Figure 6 - Log In to ClockIN after Download*



## □ Clock Out Anywhere – Log time from your mobile device

Having clocked in time in an earlier step, and logged into your mobile ClockIN app, next you will Clock Out from your mobile device. This will allow you to experience the integration between the mobile and desktop ClockIN apps and give you a true “mobility of experience.” [Watch the video.](#)

Start from **Time Clock** screen on your mobile, which is the default, or select it from the menu options to navigate to it. If you did not previously Clock In from the desktop, go to Step 2 below.

1. Tap the **CLOCK OUT** button to stop the time and automatically log it.

**NOTE:** The time is logged for “New Customer Onboarding” as selected on the desktop.

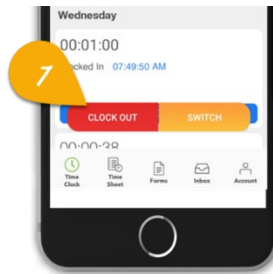


Figure 7 - CLOCK OUT from Mobile

2. Tap **CLOCK IN** to clock in from your mobile device.

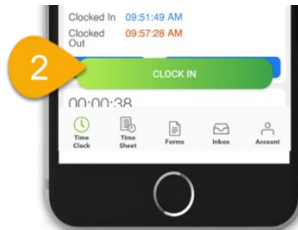


Figure 8 - CLOCK IN from Mobile

3. Tap **CLOCK OUT** to log your second clock of time.

**NOTE:** The system requires you associate the time with an Objective and Task, same as the desktop version, and defaults to your General Portfolio. If you wanted to switch to another Portfolio/Project Grouping, click “SWITCH.”

- a. **Objective** - Tap **Customer Onboarding**
- b. **Task** – Tap **New Customer Onboarding**
- c. Tap **Save**

## □ But There's More – Add and Update Time Manually via the Timesheet

The advantage of the Clock In/Clock Out feature is that it keeps track of the time for you. However, you may want the option to manually enter a start time and end time (e.g. for certain types of activities or if you need to log time in the past, such as a vacation or sick day). [Watch the video.](#)

Manual time entry is done via the Timesheet as follows:

1. Tap **Timesheet** from the menu options on the mobile app.
2. Tap the **Date** for which you want to manually record time.

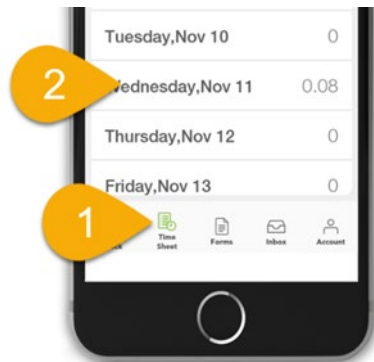


Figure 9 - Choose a Date to Add Time

3. Tap the **plus sign (+)** in the upper right of the mobile screen.
4. Tap **Add Task** to
  - a. Add the **Objective** (e.g. Customer Onboarding Objective ) and
  - b. Add the **Task** (e.g. ClockIN Onboarding), and then
  - c. Tap **Save**
5. Tap **Clock In** to enter the start time
  - a. Use the clock interface, or
  - b. Tap the keyboard icon to type in the start time.
  - c. Tap **OK** to save the start time.
6. Tap **Clock Out** to enter the end time.
7. Tap **Save** to log your Manual Time Entry

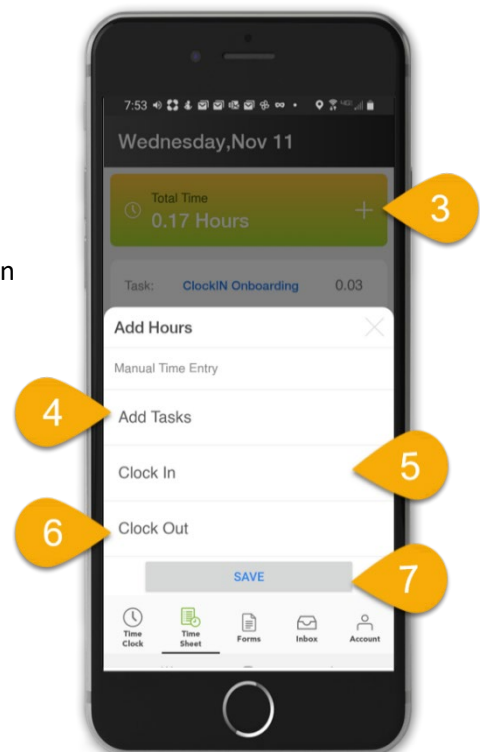


Figure 10 – Manual Time Entry

## □ See and Manage Timesheet on the Desktop - A Familiar Timesheet View

The Timesheet is also available via the desktop, and provides a familiar, grid style view with a modern twist. Experience how to manually enter time, and view logged time, with the guidance of the in-app Help feature. [Watch the video.](#)

**NOTE:** The in-app “Help” is available within many of the applications and pages throughout the desk application (web based tenant). This is a good feature to familiarize yourself with when first learning ClockIN or as a refresher.

The example below provides step-by-step instructions for using the Timesheet. Start by returning to the desk top version via your ClockIN URL and click the checklist item “[See and Manage Timesheet on the Desktop](#),” or:

1. Click **Time** on the left-side menu, then
2. Click **Timesheet**
3. Click **Help**
4. **Follow the in-app help guidance** via the instructions provided for each step, making selections or adding information as you go.
5. **Click next** to proceed through the process for adding time via the Timesheet.

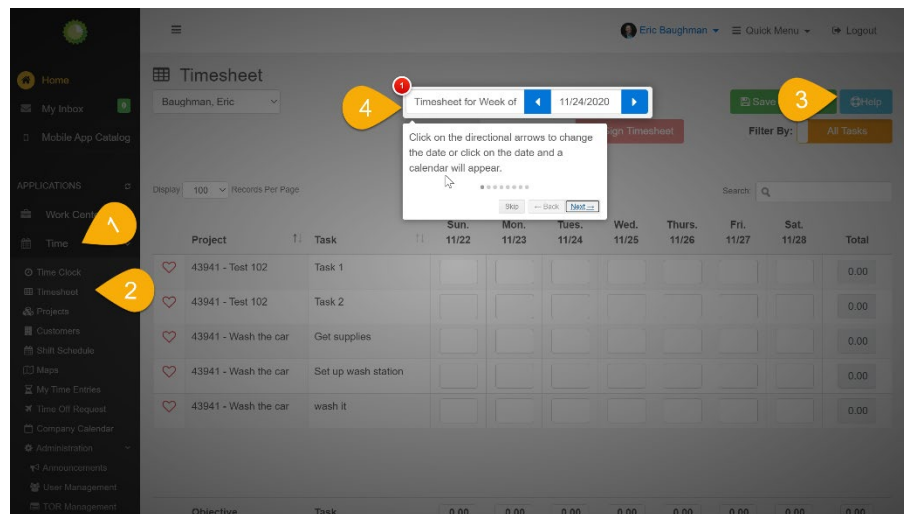


Figure 11 - Desktop Timesheet In-App Help